

MEDICAL TOURISM IN INDIA: A THEORETICAL ANALYSIS USING PEST MODEL

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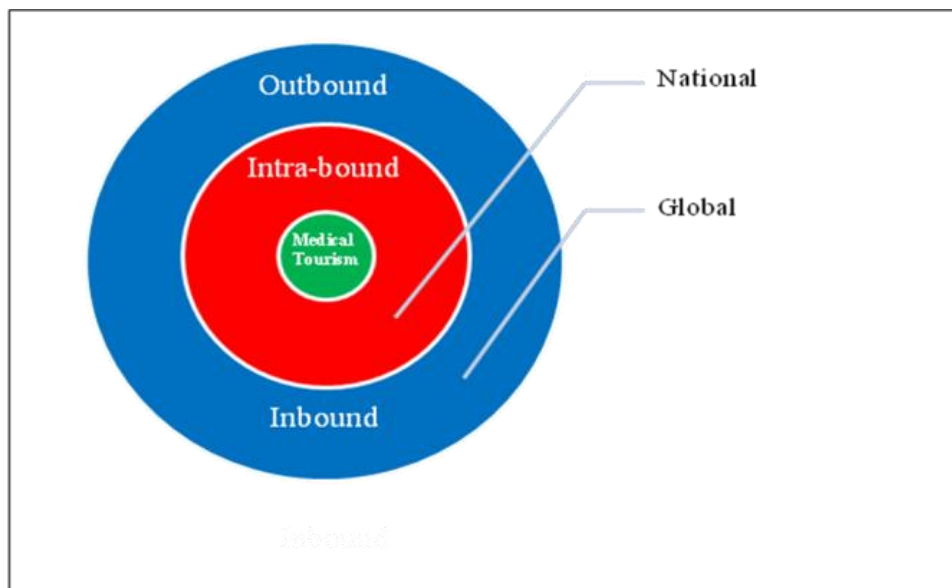
ABSTRACT

Medical tourism is a process of traveling to avail medical care. There are three categories of medical tourism namely outbound, inbound and intra-bound. Outbound tourism means that the people travel to other countries to avail medical care, inbound are those who arrive from different countries to India for medical care, whereas intra-bound is that patient who travels within India for the search of the center of excellence in other region or state. In this way, medical tourism in India has a market which is of the two levels global and national respectively. The customers of medical tourism will be both international and domestic tourists. Therefore, the PEST model has been used to perform macro analysis of medical tourism in India. In order to understand the problems and prospects of medical tourism both global and national factors have to be analyzed. A two-level analysis namely global and National has been done.

Keywords: Medical Tourism, Outbound Tourism, Inbound Tourism Pest Analysis.

Introduction

Two-level Research Framework



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the elongated analysis patterns have helped us in understanding the most important parameters influencing the levels, the parameters of the first level are applied to the second level so as to have a clear scan of external- macro environment in which the medical tourism exists.

Medical Tourism: Macro Analysis

Medical Tourism is defined as a blend of tourism and health, together known as health or medical tourism. It is an act of traveling abroad to seek medical services that promote the well-being of the patients. Sophisticated treatments to a routine health check-up are the services offered in the medical tourism market. The World with medical tourism market has seen a tremendous growth and it enjoys variety of its kind and medical tourists pursue medical services with high quality and affordable prices (Urkett 2017:225) the number of people who use healthcare is growing significantly and the export of these services in the world has been able to grow exponentially. The trend in the globalization of healthcare has enabled many people worldwide to opt for healthcare services in other low-cost destinations. The enormous influx of patients is the result of rising in treatment cost in the developed nation along with the availability of high-quality medical services at significantly lower prices in developing nations. A number of cross-border patients are expected to rise in near future. 14 million people have here traveled to other countries to avail healthcare services in the year duty 20014-15. The medical tourists have made a saving of about 30 to 90 percent just by traveling to another country for their treatments. The global tourism market was valued at USD 10,515.6 million in the year 2012 and expected to grow at CAGR of 17.9 percent from 2013 to 2019. It is estimated that in the year 2019 it will be USD 32453.4 million. The total market size is of approximately of 45.5 to 72 billion USD with 15-25 percent growth rate. Asia has become one of the most prominent players in the list of world-class top medical tourism destinations. India, Malaysia, Singapore, and Thailand are the prominent healthcare services provider in the Asian Region. Among Asian Region, Thailand is considered to be the most popular destination among the Europeans for cosmetic surgeries. Singapore and India are for complex procedures. India offers a cost advantage whereas technology advantage is offered by Singapore.

The globalization is the main reason for the evolution of the concept of medical tourism. Boundaryless world, intense competition, and dynamic environment have made it challenging for both the producer and consumers of medical tourism. The number of patients seeking medical care and who are able to afford has been increased exponentially, as not provided by the public health system. They are willing to travel and access better care and specialized treatment not available to their own country. Seeking medical services abroad on their own may not be a good idea for many patients. They have their own reasons to travel to another country for medical care. This has led to the rise of medical tourism facilitators or medical tourism operators.

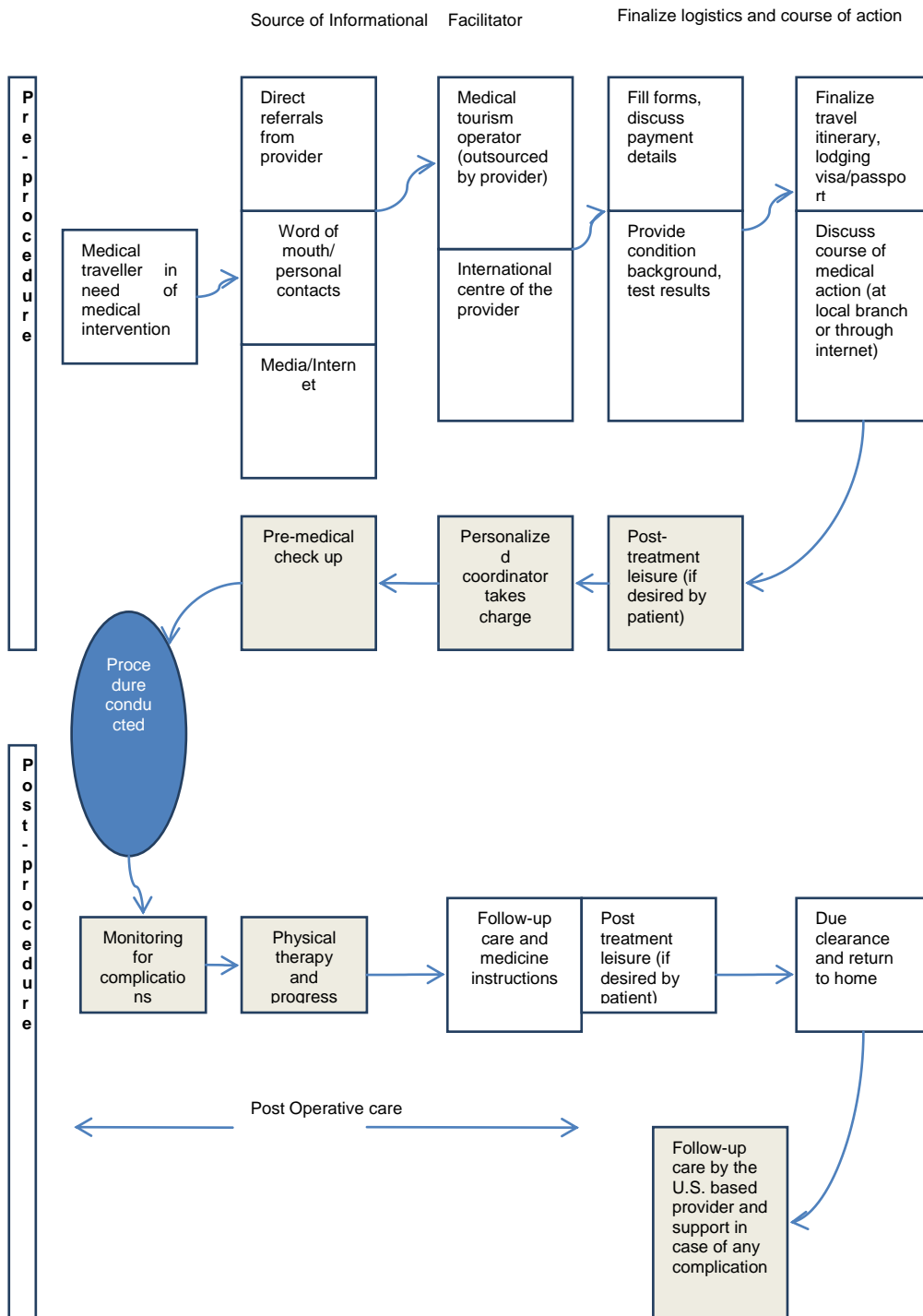
Their facilitators have experience and, are able to solve every quarry of the patients. They support them at multiple points along with their journey the new trend which has grown in medical tourism is a trend of medical tourism operators or facilitators. They can be divided into following four groups.

Medical Tourism New Trends

The concept of medical tourism is not new. There is a very vast history where people have traveled across the globe to receive same or other forms of medical treatments. It has been only a few decades since when it has got media attention and gained popularity. Opinion on defining medical tourism is not unified due to its inquiry nature for the purpose of this research study it becomes necessary to start it by defining that what is meant by medical tourism. According to OECD, it is *“when the consumer elects to travel across international borders with the intention of receiving some form of medical treatment is called as medicaltourism. Treatment may span the full range of medical services, but most commonly includes dental care, cosmetic surgery, elective surgery, and fertility treatment. Setting the boundary of what is healthy and counts as medical tourism for the purposes of trade accounts is not straightforward. Within this range of treatments, not all would be included within health trade. Cosmetic surgery for aesthetic rather than reconstructive reasons, for example, would be considered outside the health boundary”* (OECD, 2010, pp.30-31). Definition according to McKinsey (2008) *“when a person whose primary and explicit purpose in travelling intoobtaining medical treatment in foreign country excluding emergency tourists, wellness tourism, expatriates seeking care in their country of residence, patients travelling to neighbouring region is to the closest available care is called medical tourism”*.

Across the different types of medical tourism facilitators, there is a common outline of the consumer's path ⁴ in seeking, receiving and recovering from a medical procedure performed abroad. The following figure shows the consumer's path to the medical tourism.

Medical Tourism Process

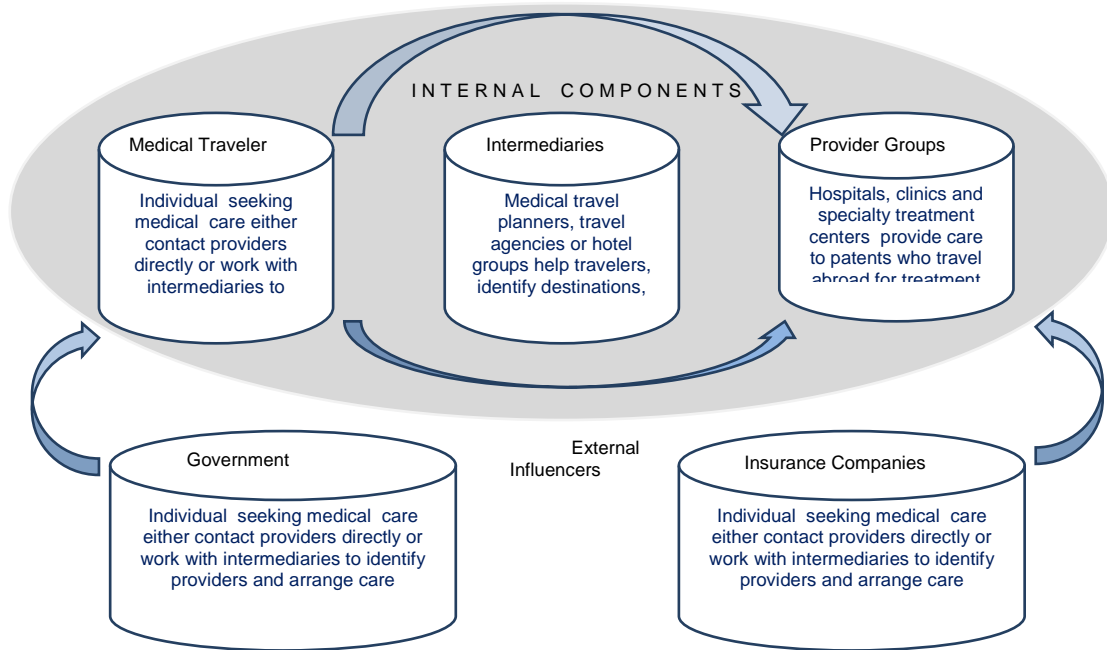


Source: Tourism in Canada: Exploring a new frontier © Deloitte & Touche.LLP and affiliated entities.www.delliotte.com

Medical Tourism operators or facilitators influence the medical tourism market internally. The momentum in the market can only be maintained by these intermediaries medical travelers and the

provider groups are also the important sources of momentum provider who influence the Industry internally. Medical tourism is no less than a complex network or interconnected system. It has both the internal components and the external influences. Medical travelers and the provider groups can either contact directly or through intermediaries. Medical tourism has five major components in its ecosystem. The following figure provides shows the medical tourism system.

Medical Tourism System



Source: "Medical Tourism: consumer in search of value", Deloitte Centre for Health Solutions, 2008; IHG and the Medical Tourism Association Join to Facilitate Medical related Travel into Latin America", Intercontinental Hotel Group, June 5, 2008;

Medical Tourism: Global Market

Parameters	Segment CAGR%	2012 (USD) Million	2019 (USD) Million
Global Medical Tourism Market	17-9	10,515.6	32,453.4
Top Destinations (World)	Costa Rica, India, Israel, Malaysia, Mexico, Singapore, South Korea, Taiwan, Thailand, Turkey, United States.		
Asia	India, Thailand, Singapore & Malaysia		
Market Size	45.5 – 75 Billion USD Approximately		
No of Cross-Border Patient	4 Million		
Average Spending	3800-6000 USD per visit (including all other related costs)		
Market Growth Rate	15 – 25%		
Top Speculation of Traveller	<ul style="list-style-type: none"> • Cosmetic Surgery • Dentistry • Cardiovascular • Orthopaedics 	<ul style="list-style-type: none"> • Cancer • Representative • Weight loss • Diagnostic 	<ul style="list-style-type: none"> • Second Opinion
Leading hospital for medical tourism (2014)	<ul style="list-style-type: none"> • Prince Court Medical Centre, Malaysia • Asklepios Klinik Barmbek, Germany • Fortis Hospital Bangalore, India • Anadolu Medical Center, Turkey • Wooridul Spine Hospital, Korea • Shouldice Hospital, Canada • Gleneagles Hospital, Singapore • Clemenceau Medical Center, Lebanon • Bumrungrad International, Thailand 		

In a three-part assessment by Patients Beyond Borders of Chapel Hill, North Carolina, 42 worldwide medical sites were identified which provide value and quantity. The following illustration shows the list of medical sites around the globe.

Foreign Medical Institutions Identified by Patients Beyond Borders

Country	Medical Institution
Mexico	<ul style="list-style-type: none"> Christus Muguerza Alta Especialidad Hospital , Monterrey
Costa Rica	<ul style="list-style-type: none"> Clinica Biblica Hospital, San Jose
Barbados	<ul style="list-style-type: none"> Barbados Fertility Centre, Christ Church
Brazil	<ul style="list-style-type: none"> Hospital do Caracao, Sao Paulo Hospital Israelita Albert Einstein, Sao Paulo Hospital Samaritano, Sao Paulo
India	<ul style="list-style-type: none"> Asian Heart Institute, Bombay Apollo Hospitals, Chennai Indraprastha Apollo Hospital, Delhi Shoff Eye Hospital and LASIK Centre, Bombay Wockhardt Hospital, Bangalore Wockhardt, Hospital, Bombay
Thailand	<ul style="list-style-type: none"> Bangkok Hospital Medical Center, Bangkok Bumrungrad International Hospital, Bangkok Samitivej Sukhumvit Hospital, Bangkok
Philippines	<ul style="list-style-type: none"> St. Luke's Medical Center, Quezon City
Singapore	<ul style="list-style-type: none"> Alexandra Hospital Changi General Hospital Gleneagles Hospital and Medical Centre John Hopkins Singapore International Medical Centre KK Women's and Children's Hospital Mount Elizabeth Hospital National Cancer Centre Singapore National University Hospital Singapore General Hospital Tan Tock Seng Hospital
Taiwan	<ul style="list-style-type: none"> Min-Shen General Hospital, Taoyuan City Taipei Medical University
South Korea	<ul style="list-style-type: none"> Severance Hospital, Seoul
United Arab Emirates	<ul style="list-style-type: none"> American Hospital, Dubai Dubai Hospital International Modern Hospital, Dubai Tawam Hospital, Al Ain Zelkha Hospital, Sharjah
Czech Republic	<ul style="list-style-type: none"> Na Homolce Hospital, Prague
Turkey	<ul style="list-style-type: none"> Acibadem Healthcare Group, Istanbul Anadolu Medical Centre, Kocaeli Istanbul Memorial Hospital Kent Hospital, Izmir Gayrettepe Florence Nightingale Hospital, Istanbul
Jordan	<ul style="list-style-type: none"> Jordan Hospital, Amman King Hussein Cancer Centre, Amman

Source: "Hospital for Medical Travellers, "U.S. News & World Report Available at <http://www.usnews.com/usnews/multimedia-asset/080429/>

Medical Tourism: Waiting Time

Waiting time is the time interval between the days, a patient agrees to a procedure or treatment and his name is added on the waiting list to the date of receiving the service what she or he is waiting for. The main reasons behind occurring long waiting time generally are unorganized service, a smaller number of healthcare workers and lack of teamwork among physicians. There are variations in waiting time main reasons behind this variation are emergency cases as they need to be given priority over on urgent cases. Seasonal variation in capacity is one reason during peak vacation periods. Waiting time increases because of seasonal reduction in services other important reasons is related to the availability of health providers and resources this includes health care professional's hospital beds, technology etc.

Medical Tourist Destinations: Long waiting Time

Country	Waiting Period
Canada	<ul style="list-style-type: none"> • 57% of the total population has to wait for at least 4 weeks for any kind of medical care. • 36% population has to wait for at least 6 days. • 54% No non-emergency care on • Nights • Weekends • Holidays • 2 years waiting for non-essential surgeries.
United Kingdom	<ul style="list-style-type: none"> • 57% of the population has to wait at least 4 weeks. • 38% No non-emergency care on • Nights • Weekends • Holidays • 18 months waiting for non-essential surgery. • 57% physician reported that their patients experienced a long wait for diagnostic tests. • 63 days (highest) waiting time in the world for coronary artery bypass grafting.
The United States of America	<ul style="list-style-type: none"> • 61% no non-emergency care on • Nights • Weekends • Holidays • 100% Populations • 29 days to see even a dermatologist • 66 days to have a physical exam • 32 days for a heart evaluation • 7 days for acute evaluation like asthma, chest pain etc.
Australia	<ul style="list-style-type: none"> • 2 years waiting time for non-essential surgeries. • 52% nonon-emergency care on • Nights • Weekends • Holidays
Germany	<ul style="list-style-type: none"> • 22% No non-emergency care on nights. • Nights • Weekends • Holidays
Portugal	<ul style="list-style-type: none"> • 178 days (highest) waiting time for hip replacement • 120 days (highest) for a hernia
Ireland	<ul style="list-style-type: none"> • 144 days (highest) for a cataract operation.

Medical Tourist Destinations: Short Waiting Time

Country	Waiting Period
Netherlands	<ul style="list-style-type: none"> • 42 days (lowest) waiting time for hip replacement (procedure wise) • 42 days (lowest) for knee Replacement (procedure wise) • 35 days (Lowest) – Cataract • 36 days (Lowest) – A hernia
Denmark	<ul style="list-style-type: none"> • 19 days (Lowest) of coronary artery Bypass Grafting.
Ireland	<ul style="list-style-type: none"> • Comparatively lower waiting time • Orthopaedic Treatment • Prostatectomy • Cholecystectomy
India	<ul style="list-style-type: none"> • Instantaneous knee reconstruction surgeries • Almost zero waiting time.
Thailand Singapore Malaysia	<ul style="list-style-type: none"> • Short waiting time for various surgeries and treatments

In many Asian Countries, patients are able to reduce the waiting time for elective surgeries and treatments. While also saving some considerable costs.

Medical Tourism: Micro Analysis

A very useful technique to explore the industry's external macro environment in which an organization exists. In our study, we have used PEST model to understand the political, economic, social cultural and technological environment that medical tourism industry operates in. The idea behind is that it can be useful for evaluating growth and decline of the market, position, political and direction for medical tourism business in India.

- In India, the medical tourism activity is mainly driven by private sector.
- The main role of the Ministry of Tourism, Government of India is to facilitate marketing and promotion in the key market.
- The Government of India has taken various initiatives to promote India as a medical tourism destination at International platform.
- Ministry of Tourism Government of India home started some very good schemes to promote and develop medical tourism.
- Mission statement government of India.

"To promoted India as a Holistic Tourism Destination for 365 a day's offering varied Niche Tourism Product"

MDA (Marketing Development Assistance) scheme

- Support under the Marketing Development Assistant (MDA) scheme for wellness tourism providers (WTPs) and Medical Tourism Providers (MTPs).
- (WTPs) includes travel agents, tour operators involved in wellness tourism.
- (MTPs) includes (MTFs) Hospitals and medical tourism facilitation.
- The government has provisions for providing a financial assistant for agents and operators.

Fair/ National and International events/shows are approved.

- Financial Assistance as per the provision of (MDA) schemed would be approved too.
- (WTPs) – SPAs Accreditation by National Accreditation Board for Hospitals (NABH) and/or AYUSH or state/UT Governments.
- (MTPs) - Hospital Accreditation by joint commission for International Accreditation Hospitals (JCI) and or National Accreditation boards of Hospitals (NABH).
- (WMTPC) – Wellness and Medical Tourism Committee. (WMTPC)-constituted for the consideration of all financial Assistance except (MDA) Marketing Development Assistance.

Publicity & Promotion

- The government provides financial support in the ratio of 50:50 for marketing publicity and promotional material.
- It also provides Financial Assistance for organizing workshop/events/seminars having focus on promotion of wellness and medical tourism subject to the condition

Permission for the use of Incredible India logo

- Incredible India is the most recognized brand globally.
- Ministry of tourism has given permission to use the Inerrable India logo for the wellness and tourism promotion events, films, literature etc. They just have to follow the prescribed precedents.

The Ministry of Tourism would provide financial support for

- Training courses focus on skill providing skills.
- Up gradation and skills certification courses.
- CBSP – Capacity Building for service providers.
- Training at various levels.

Participation in fairs and events

The government has a provision to provide space up to 4 square meters to wellness and Medical Tourism Associations at various major international fairs promoting Medical Tourism.

Medical Tourism: Institutions in India

India has become the favorite healthcare destination because of its large strength of well qualified and trained physicians, staff, technology and highly affordable cost structure. India has a comparatively large number of JCI and NABH accredited hospitals in its major cities. The following hospitals are the leading service providers.

Jaypee Hospital



Source: <http://www.jaypeehealthcare.com/about-us/overview/>

- ❖ Advanced Neonatal ICU
- ❖ Dialysis Unit
- ❖ 325 ward beds with Suite, Deluxe, Twin Sharing and Economy options
- ❖ 18 Modular OTs
- ❖ Cardiac Catheterization Lab with Hybrid Operating Room
- ❖ Linear Accelerator (IMRT, IGRT and VMAT), 1 Brach therapy Suite, Wide Bore CT Simulator
- ❖ MRI (3.0 Tesla) with High Intensity Focused Ultrasound
- ❖ 256 Slice CT Scan, CT Simulation
- ❖ 64 Slice PET CT, Dual Head 6 Slice SPECT CT, Gamma Camera
- ❖ Da Vinci Robotic Surgery for comprehensive robotic surgical solutions

Narayana Health –Multispecialty Hospital



Source: <http://www.narayanahealth.org/about-us/nh-overview>

- ❖ Narayana Health is a chain of multi-speciality hospitals in India, headquarters in Bangalore
- ❖ The hospital chain operates one of the largest telemedicine networks in the world.
- ❖ Narayana Health operates a chain of hospitals, heart centres, and primary care facilities across India.
- ❖ Narayana Health offers speciality and tertiary care facilities covering a wide range of specialisation.
- ❖ The group also offers oncology services for most types of cancer including head, neck, breast, cervical, lungs, ortho, urogenital and gastrointestinal.

Fortis Escorts Heart Institute



- ❖ Twenty centers and associated hospitals throughout India
- ❖ Nine hundred beds facility to carry out 5,000 open-heart surgeries, 5,000 angioplasties, and 15,000 angiographies annually.
- ❖ Cardiac specialties include standard and specialty coronary bypass surgery, transmyocardial laser revascularization (TMLR), heart port surgery, robotic surgery for aortic aneurysms and dissections, carotid endarterectomy, valve surgery, and treatment of peripheral vascular disease.
- ❖ Known primarily for heart work, the Institute also specializes in orthopaedics, respiratory, kidney (transplant and dialysis), neurology (brain, spine and peripheral nerves) and dental surgery.
- ❖ In 2013, The Week/Nielson ranked the institute the top private heart hospital in Delhi and fifth best in cardiology in India
- ❖ Escorts' International Services Department offers airport tele-consultations, remote second opinions, pickup and drop-off, travel arrangements, an interpreter, currency exchange, customized in-hospital cuisine, and sightseeing.

Fortis Hospital Bangalore



- ❖ Fortis Hospital Bangalore This location is one of four Fortis facilities in Bangalore.
- ❖ Opened the doors to its new state-of-the-art, 400-bed super-specialty hospital in August 2006.
- ❖ Formerly known as Wockhardt Super-Specialty Hospital
- ❖ Specialties include cardiovascular surgery, cardiology, orthopaedics, neurosciences, minimal access surgery, and women's and children's services.
- ❖ Designed in consultation with Harvard Medical International (HMI).
- ❖ HMI works with selected healthcare providers across the globe to improve excellence in clinical medicine, medical education, and biomedical research.
- ❖ In 2008, JCI accreditation was awarded; the centre was re-accredited by JCI in 2014.

Rotunda: The Centre for Human Reproduction



- ❖ India's most respected fertility treatment facility. In-house pathology, endoscopy, and sonography services allow a couple to undergo all tests and procedures under one roof.
- ❖ In addition to the standard fertility services, Rotunda also offers gestational surrogacy services, donor egg in vitro fertilization (IVF), laser-assisted hatching, and a recurrent pregnancy loss clinic.
- ❖ India's only lesbian-gay-bisexual-transsexual-friendly centre.

Shroff Eye Hospital



- ❖ Shroff Eye among the few JCI-accredited independent vision hospitals in the world.
- ❖ Catering to international travellers from more than 90 countries.
- ❖ Corneal treatments, including keratoplasty, oculoplastic surgery, and other cosmetic treatments
- ❖ Paediatric eye care, including squint and "lazy eye"
- ❖ The treatment involves new technologies that measure distortions in the eye, providing the physician with the information needed to chart a treatment plan customized to each patient.
- ❖ In 2012, Shroff was awarded full JCI re-accreditation. The hospital has two centers in Mumbai, on Bandra Road (main facility and corporate headquarters) and Marine Drive.

1 Source: <http://www.fortisescorts.in>,

2. Source: <https://www.medigo.com/en-gb/clinic/india/bangalore/fortis-hospital-bangalore>.

3. Source: <http://www.imt.ie/news/rotunda-stops-monthly-mortality-reports-01-07-2016>.

4. <http://www.lasikindia.in> July 2015

Fortis Hospitals Mumbai Mulund

- ❖ Famous throughout Asia and the rest of the world for its specialty centers.
- ❖ Fortis Mulund is one of India's shining healthcare stars, particularly in the area of heart disease and surgeries
- ❖ Facility is part of the giant Fortis Healthcare, with more than 54 multi-disciplinary medical centers and specialty clinics in India, Dubai, Mauritius and Sri Lanka, totalling nearly 10,000 beds and 240 diagnostic centers.
- ❖ Fortis' Mumbai location also offers its world-renowned Hip Resurfacing Clinic, where hundreds of patients from America and Europe have been treated in last few years.
- ❖ A partnership with Harvard Medical International (HMI), a division of Boston's Harvard Medical School, gave Fortis Mumbai access to top-flight international medical expertise, along with standards oversight and best practices discipline.
- ❖ In 2005 Fortis in Mumbai became the first super-specialty hospital in South Asia to receive JCI accreditation and was re-accredited by JCI in 2014.

Max Healthcare and Super-Specialty Hospitals

- ❖ Twelve specialty centers, with 2600 beds and 2300 doctors
- ❖ International health travellers usually visit one of Max's two super-specialty centers, (both in New Delhi), mostly for cardiac and orthopaedic surgeries.
- ❖ In 2010, Max Delhi treated more than 20,000 international patients from 50 countries.
- ❖ Main departments include:
 - ❖ Institute of Neurosciences (brain tumours, aneurysms, stroke, infectious diseases of the brain, spinal tumours, and chronic spinal pain)
 - ❖ The Max Cancer Centre (integrated, team-oriented approach to surgical, radiation, and medical oncology)
 - ❖ Max Eye care (vision correction, cataract surgery, and corneal surgery)
 - ❖ Institute of Aesthetic and Reconstructive Plastic Surgery (birth defects, range of cosmetic procedures)
 - ❖ Offers telemedicine evaluation and recommendations.
 - ❖ Travel arrangements to Delhi (including visa, ticketing, airport pickup and drop-off, currency exchange, lodging assistance and special return journey arrangements if needed), interpreters, lodging assistance, and an exclusive help-desk and dedicated relationship manager to ensure quality service.

Apollo Hospitals Group

- ❖ Asia's largest private healthcare group
- ❖ Apollo Hospitals Group includes 54 hospitals in India and overseas, has a total bed capacity of 9,200, offers 55 medical specialties, and annually treats more than 255,000 inpatients and 2.2 million outpatients.
- ❖ Have five JCI-accredited hospitals, four of which welcome a high volume of international patients. Apollo's hospitals in Chennai, Delhi, Bangalore, and Hyderabad collectively treat more than 50,000 international patients from 55 countries every year

Columbia Asia India

- ❖ Columbia Asia is an international healthcare provider with a chain of hospitals across India, Malaysia, Vietnam and Indonesia.
- ❖ A centralized International Patient Services Centre helps patients match conditions with the appropriate facility and doctor; provides a 24/7 international help desk, airport transportation, tele consultation directly with the treating doctor, treatment estimates, language interpretation services and assistance with insurance.
- ❖ The company's highly skilled medical experts deliver care in modern hospitals specifically designed for the needs of patients and built for maximum comfort and efficiency.

1. Source: https://www.truekure.com/img/1474736520_fortis-mulundcopy.png

2. Source: http://www.wellnessindia.com/article/images/uploads/_Max-Hospital600.jpg

3. Source: <http://www.indiacancersurgerysite.com/apollogleneagles-kolkata-india/images/apollo-hospital-image.jpg>

4. Source: <http://wecareindia.com/columbia-asia-hospital-bangalore/> July 2015

Exhibit 3.18: JCI accredited Hospitals in India

Hospital ¹⁵		Location
1.	Aditya Birla Health Services Ltd.	Pune
2.	Apollo Gleneagles Hospitals, Kolkata	Palakkar
3.	Apollo Hospital, Kolkata	Kolkata
4.	Apollo Hospital, Chennai	Chennai
5.	Apollo Hospital, Hyderabad	Hyderabad
6.	Apollo Hospitals International Limited	Gandhi Nagar
7.	Apollo Hospitals, Bangalore	Bangalore
8.	Artemis Hospital (a unit of Artemis Medicare Services Ltd.)	Guru gram
9.	Asian Heart Institute and Research Centre Pvt Ltd	Mumbai
10.	Care Institute of Medical Sciences	Kochi
11.	Columbia Asia Referral Hospital, YeshwanthPur	Bangalore
12.	Continental Hospitals Limited, Hyderabad	Hyderabad
13.	Dhirubhai Ambani Occupational Health And Family Welfare Centre	Jamnagar Gujarat
14.	Fortis Escorts Heart Institute	New Delhi
15.	Fortis Hospital Limited, Mulund	Mumbai
16.	Fortis Hospital, Bangalore	Bangalore
17.	Fortis Hospital, Mohali	Mohali
18.	Grewal Eye Institute Private Limited	Chandigarh
19.	Indraprastha Apollo Hospitals	New Delhi
20.	KokilabenDhirubhai Ambani Hospital & Medical Research Institute	Mumbai
21.	Medanta - The Medicity	Guru gram
22.	Moolchand Hospital	New Delhi
23.	Narayana HrudayalayaPvt. Ltd.	Mumbai
24.	Narayana Multispeciality Hospital, Jaipur	Bangalore
25.	National Institute of Ophthalmology	Pune
26.	Rajagiri Hospital	Ernakulum
27.	SatguruPartap Singh Hospital	Ludhiana
28.	Seven Hills Healthcare Private Limited	Mumbai
29.	Shroff Eye Hospital/Shroff Eye Clinic	Mumbai
30.	Sri Ramachandra Medical Centre	Chennai
31.	Rajagiri Hospital	Ernakulum

Exhibit 3.19: Treatments Available in India

Treatments ¹⁶		Procedures
Heart Surgery in India	<ul style="list-style-type: none"> • Offer a complete package of surgical treatment for the specialized healthcare sector. • The surgical package includes. • Domiciliary hospitalization. • Stay/Accommodation. • Patient Care. • Post operative medical consultancy. 	<ul style="list-style-type: none"> • Beating Heart Surgery • Open Heart Surgery • Angiographies • Angioplasties • Paediatric Cardiac Surgery • Paediatric Intervention • Cardiology Robotic Surgery • Minimally Invasive Cardiac Surgery • Peripheral Vascular Surgery • Coronary Artery Bypass Grafting • Aortic Aneurysm Surgery • Arrhythmia Surgery • Pae Paediatric Surgery • Value Surgery • PDA • ASD • VSD • TOF • Repair of Adult Coarctation • Redo Tetralogy • DTGA

Cosmetic Surgery	<ul style="list-style-type: none"> • Cosmetic Surgery has become the buzz word among the people who won't have a better look and more than their best. • India after multiple cosmetic surgery options. • It ranges from correction of disfiguration to breast enhancements. 	<ul style="list-style-type: none"> • Hair restoration • Hair implants • Hair flaps • Scalp reductions • Rhinoplasties • Reshaping or recontouring of the nose • Stalling of the aging process • Face Lifts • Cosmetic eyelid surgery • Brow lifts • Sub-metal lipectomy for double chin
Orthopaedic Surgery	<ul style="list-style-type: none"> • A very large number of various leading super specialty Hospitals across the country offer modern treatment in the field of orthopedics. • Orthopaedics Procedures. 	
Dental Surgery & Dental Care	<ul style="list-style-type: none"> • Complete Dental Care Covering Dental Surgery and Dental Care. • Cost of Treatment in one Tenth of the western countries. • Patient from the USA and Europe visit India for a grand holiday and dental care. • Dental packages are clubbed with a hire package tour. • Medical Tourism in India, Health Tourism in India and Dental Tourism in India are synonyms. 	<p>Maxillary Surgery</p> <ul style="list-style-type: none"> • Overdenture • Combined prostheses with milling • Dental Bonding • Dental Bridges • Dental Caps • Dental Crowns • Dental Fillings • Dental Implants • Dentures • Root Canals • Teeth Whitening • Tooth Contouring and Reshaping • Composite and Porcelain Tooth Veneers <p>Dental Procedures</p> <ul style="list-style-type: none"> • Dental Scanning – Intra mouth • Surgical Intervention under general anesthesia • Ceramic caps without gold under microscopic control • Prosthesis on the implant • Vertical and horizontal bone grafting • Gum Grafting • Palatal orthodontics • Fluoride treatments for children
Eye Care & Surgery	<ul style="list-style-type: none"> • India is known for world-class International standards and latest procedures in minimal incision surgeries. • New famous eye surgery of India now a day in Refractive surgery both among the public and apthamalmologestes is gaining popularity. • Medical Tourism has got a big boost as the eye care and surgery is gaining popularity and accepted worldwide. • 40 centers for cornea, Cataract, Squint, and glaucoma. • India has the best ophthalmic surgeons. • No stitch contract surgery. • Lasic surgery. 	

Medical Tourism: Cost

Price is one of the major elements which are responsible for medical tourism. Sometimes the other parameter like the quality of treatment and healthcare services are somewhat same, in that situation cost plays an important role in the decision-making of patients opting for medical tourism. A significant cost difference exists between different healthcare destinations. When it comes to medical treatment cost, overall price depends on various factors the prices can be very low or high depending upon related services offered along with medical care. The following table shows the cost of treatments in different countries for the same procedure they are not the actual comparison but the approximate one, they also do not include airfares travel or lodging costs for patients the prices will vary depending upon many factors including hospitals, doctor's experience exchange rates accreditation and much more.

Conclusion

There are many factors which determine medical tourism in India, high-quality treatment at the lowest price with almost no waiting time is the prime healthcare tourist motivation. Thus, medical tourism in India has a huge demand. The medical tourism industry is not a single string. It is a combination of industries i.e. For India Medical tourism industry means Healthcare industry hospitality industry and transport industry together. Medical Tourism in India provides large numbers of procedures with high quality but at comparatively low cost, alternative treatments for the same diseases are the specialty of India. Vibrant Economy, high potential for all kind of tourism, especially medical tourism. India provides a great opportunity to combine medical tourism with a vacation. Variety of existing tourist attractions available in India for recuperating patients. Poor image of being unhygienic and patient's safety are the major constraints in the path of development of medical tourism in India. Government and the people involved in this business need make a lot of efforts.

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